

شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Sunday, 25th May 2025



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

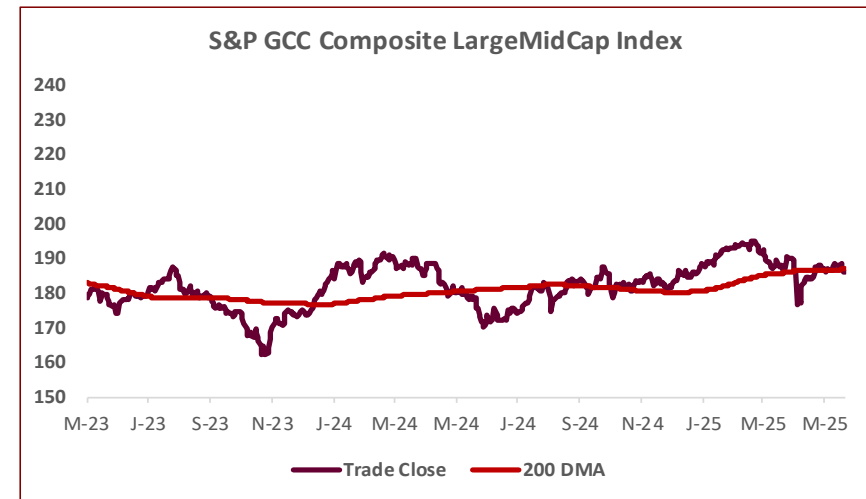


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	11,188.7	-1.02	-2.58	-4.14	-6.95	-7.04	2.04	15.81	3.82	9,306.59
Qatar (QE Index)	10,774.3	0.02	1.89	3.01	5.29	1.92	1.22	11.78	4.58	544.08
Dubai (DFMGI)	5,464.2	0.21	0.16	2.96	7.22	5.92	1.77	10.23	5.14	818.01
Abu Dhabi (ADI)	9,665.3	-0.02	0.12	1.37	3.17	2.62	2.04	14.75	3.00	2,709.80
Bahrain (BAX)	1,922.4	0.08	0.08	0.53	-1.49	-3.20	0.84	8.43	5.24	7.46
Muscat SE INDEX	4,497.5	0.59	1.98	4.20	2.99	-1.73	0.80	9.34	6.31	7.32
SP GCC Comp LMC	186.1	0.07	-1.21	-1.08	-2.14	-0.94	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	160.2	0.25	0.37	3.55	6.29	5.21				

Developed Markets										
MSCI World Index	3,802.8	-0.42	-1.57	4.03	4.80	2.56				
U.S. (S&P 500)	5,802.8	-0.67	-2.61	4.20	3.40	-1.34	4.44	25.41	1.61	51,773.69
U.K. (FTSE 100)	8,718.0	-0.24	0.38	2.63	1.57	6.67	1.84	16.50	3.46	2,265.63
Japan (topix)	2,735.5	0.68	-0.18	2.56	2.89	-1.77	1.40	14.06	2.47	950,498.26
Emerging Markets										
MSCI EM Index	1,171.0	0.48	-0.12	5.22	6.32	8.88				
China (SSE Composite)	3,348.4	-0.94	-0.57	2.11	0.38	-0.10	1.36	12.00		44,025.04
India (Sensex)	81,721.1	0.95	-0.74	1.84	5.56	4.58	4.43	23.43	1.19	159,333.81

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	8,052.9	-0.21	-0.44	1.17	-0.26	9.38	1.65	15.10	3.46	48.91
Kuwait Premier Index	8,718.7	-0.19	-0.43	1.93	0.51	11.23	1.83	16.50	3.31	40.67
Kuwait Main Index	6,979.1	-0.32	-0.50	-2.46	-3.97	1.04	1.11	10.30	4.20	8.24
Kuwait Sector										
Banking	2,016.6	-0.12	-0.27	0.60	-1.34	11.43	1.94	16.31	3.05	30.65
Telecom	1,043.5	-0.16	-1.26	1.30	-0.60	2.54	1.57	10.10	7.27	3.19
Industrials	770.1	-0.15	-0.26	2.34	3.36	6.42	1.19	15.54	4.92	2.61
Financial Services	1,502.5	-0.95	-1.26	1.58	-0.39	-0.53	1.17	12.90	3.34	5.01
Real Estate	1,646.3	-0.49	0.22	3.48	8.52	21.67	1.15	17.34	1.78	3.50
Basic Materials	910.6	-0.14	0.48	0.00	1.30	-0.07	1.67	13.23	8.12	0.51
Health Care	573.4	3.91	1.49	-1.24	0.50	25.12	1.94	22.60	1.83	
Consumer Staples	1,107.5	1.99	3.41	5.51	12.21	10.90	2.31	20.02	2.32	0.34
Insurance	1,825.3	-0.02	-0.95	0.83	-14.39	-11.19	0.93	9.29	3.54	0.74
Consumer Discretionary	2,387.0	-0.49	-2.93	2.89	1.12	12.45				
Energy	1,522.8	-0.03	3.09	9.87	14.93	28.06	1.23	10.07	4.79	0.31
Technology	1,105.8	-1.30	-4.40	-1.94	2.70	6.29	1.29			0.02
Utilities	381.6	-0.68	0.00	-2.03	-5.84	-3.97				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices edged higher on Friday but were set for their first weekly decline in three weeks, weighed down by rising expectations of another large OPEC+ output increase for July. Brent futures rose 30 cents, or 0.47%, to \$64.74 a barrel. U.S. West Texas Intermediate crude futures were up 27 cents, or 0.44%, to \$61.47.

Kuwait Market

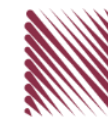
The market closed down by -0.21% at 8,052.9 value traded 74.4 million KD, Premier market value reached 55.7 million KD, closed down by -0.19% at 8,718.7.

KSA Market

The market closed down at -1.02% at 11,188.7.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.947	-0.32	-1.04	-0.53	-5.12	10.98	1.85	14.63	3.52	8.28
KFH	0.742	0.27	0.27	2.63	0.80	7.42	2.13	17.16	2.75	13.71
ZAIN	0.481	-0.21	-1.84	1.69	0.21	2.56	1.63	9.20	7.28	2.08
BOUBYAN BANK	0.672	-0.30	-0.88	-1.03	2.86	25.78	2.84	32.53	1.42	2.96
AGILITY	0.254	-0.78	-3.42	-3.42	0.79	2.83	0.66	11.43	3.94	0.68
Saudi Arabia										
ARAMCO	25.15	-3.64	-3.82	-0.79	-5.98	-10.34	4.13	15.75	6.46	6,086.30
SABIC	58.80	0.51	-2.49	-3.61	-7.69	-12.24	1.13	699.33	5.78	176.40
STC	42.60	-0.81	-1.50	-6.44	-1.79	11.34	2.33	18.81	4.46	213.00
AL-RAJHI BANK	94.00	-2.08	-3.89	-3.49	-7.84	-0.63	2.81	18.67	2.88	376.00
NCB	35.50	1.14	0.00	-0.56	-0.98	6.29	1.09	9.92	5.35	213.00
Abu Dhabi										
ETISALAT.AD	17.18	0.58	0.23	-0.69	2.25	5.88	2.95	10.91	4.80	150.28
FAB.AD	16.04	-0.12	1.01	6.66	15.92	16.59	1.39	10.21	4.68	176.98
EMIRATES NBD	23.00	1.32	1.77	11.92	13.86	7.23	1.15	6.61	4.35	145.28
DB ISLAMIC DB	7.99	-0.50	1.27	5.69	11.44	12.69	1.27	7.54	5.63	57.85
EMAR.DU	13.55	-0.37	1.50	3.44	1.50	5.45	1.49	8.37	7.38	119.77
Qatar										
QNB	17.450	0.40	1.45	4.49	8.39	0.93	1.42	10.25	4.01	161.18
INDUSTREIS QAT	12.400	-0.16	2.06	-1.27	-3.80	-6.56	2.08	17.85	5.97	75.02
QA ISLAMIC BK	22.490	0.31	4.85	6.54	9.33	5.29	1.72	12.01	3.56	53.14
MASRAF AL RAYA	2.345	-0.21	1.96	5.06	4.22	-4.79	0.89	14.91	4.26	21.81
MESAIEED PETRO	1.396	-0.64	0.79	-0.99	-2.92	-6.62	1.08	24.67	4.08	17.54
Oman										
BANK MUSCAT	0.275	-0.36	0.73	7.84	8.70	9.13	0.87	10.01	6.00	2.06
OMANTEL	0.839	0.24	1.70	2.57	-1.29	-10.74	0.98	7.86	6.56	0.63
BANK DHOFAR	0.147	0.00	0.00	-1.34	2.85	-4.40	0.61	12.89	4.39	0.45
NAT BANK OF OMAN	0.295	1.72	0.00	0.00	1.72	-0.34	0.63	9.23	3.19	0.48
OMINVEST	0.224	0.45	1.82	3.23	-7.76	-4.97	0.68	7.18	6.38	0.21

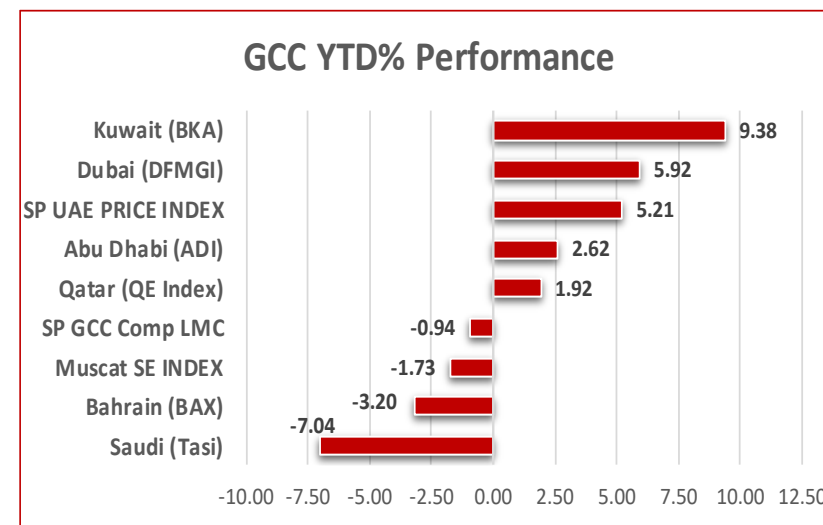
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
14-May. 25	26.66%	14.35%	0.07%	5.94%	9.17%	18.07%	13.79%	6.93%	7.43%
21-May. 25	26.74%	14.34%	0.07%	6.22%	9.09%	18.06%	13.84%	6.94%	7.44%

End of Report

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Sources, Bursa Kuwait , LSEG , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.21%, the lowest performing sector today is technology at -1.30%.

KSA

Aramco closed at -3.64%, Sabic closed at 0.51%. STC closed at -0.81% and Al-Rajhi closed at -2.08%.

UAE

ETISALAT.AD closed at 0.58%, FAB.AD closed at -0.12%.



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